

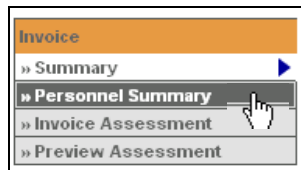


This job aid includes steps to update Category 1 Line Item information with or without creating a Personnel Summary. You should refer to your Agency Contract Manager to determine if you are required to complete a Personnel Summary to update Category 1 information before using this job aid.

## Updating Category 1 Line Item Information: Creating a Personnel Summary in EIM

If you are required to complete a Personnel Summary:

- 1) Access the **Invoice Summary** page.
- 2) Select **Personnel Summary** from the navigation bar.



The **Personnel Summary Information** page appears.

Current Location: Billing: Invoice Search > Invoice Summary > Personnel Summary

Invoice Personnel Summary Information

» Personnel Summary

Personnel Summary Information not available.

Add Personnel Summary

- 3) Click **Add Personnel Summary**.

The **Personnel Summary** page expands.

Personnel Summary Information

\*Budget Number: 1 Select

- 4) Select a Budget Number.

- 5) Click **Select**.

The **Personnel Summary Add** page appears.

### Personnel Summary Information

\*Budget Number: 1 Select

Activity: Training Service Activity

\*UFR Title: Select Below

\*Employee Last Name: Employee First Name:

\*Hours:

\*Employee Amount: Less Offsetting Support:

Net Employee Amount:

Add Personnel Summary

- 6) Enter data in the required fields: Budget Number, UFR Title, Employee Last Name, Employee First Name, Hours, Employee Amount

**Tip:** The **Employee Amount** field should be the total of all wages paid to the employee during the billing period.

- 7) Click **Add Personnel Summary**.

The **Personnel Summary** page reappears with newly-entered information.

Invoice Personnel Summary Information

» Personnel Summary

Activity: 3153 Training Service Activity Budget: 1

| UFR Title            | Employee Name | Hours  | Employee amount | Less Offsetting Support | Net Employee Amount |
|----------------------|---------------|--------|-----------------|-------------------------|---------------------|
| 102-Program Director | Figure, Frank | 120.00 | \$0.00          | \$0.00                  | \$0.00              |
| 102-Program Director | Smith, Sam    | 310.00 | \$3,100.00      | \$0.00                  | \$3,100.00          |
| 102-Component Total  |               | 430.00 | \$3,100.00      | \$0.00                  | \$3,100.00          |
| Staff Total          |               | 430.00 | \$3,100.00      | \$0.00                  | \$3,100.00          |

Add Personnel Summary

**Note:** When you add multiple Personnel Summary records (staff names) to the same Program Component UFR, the updated amount is reflected in the Invoice Summary for individual staff members as well as shown as a component total.



## Updating Category 1 Information Without Creating a Personnel Summary

If you are **not** required to complete a Personnel Summary to update Category 1 Line items:

- 1) Access the **Invoice Summary** page.

|       |                               |                     |   |             |            |        |            |
|-------|-------------------------------|---------------------|---|-------------|------------|--------|------------|
| 40515 | 1-Direct Care / Program Staff | 151 Fringe Benefits | 0 | \$23,000.00 | \$5,750.78 | \$0.00 | \$5,750.78 |
|-------|-------------------------------|---------------------|---|-------------|------------|--------|------------|

- 2) Click the [Line Item](#) link.

*The Update Line Item page appears.*

### Update Line Item

|   |                               |                    |                                     |
|---|-------------------------------|--------------------|-------------------------------------|
| Category:                                   | 1-Direct Care / Program Staff | Program Component: | 105-Physician                       |
| FTE:  | 1                             | Reimbursable Cost: | \$50,000.00                         |
| Balance to Date:                            | \$34,400.00                   | *Invoice Amount:   | <input type="text" value="500.00"/> |
| Current Balance:                            | \$34,400.00                   |                    |                                     |
| <input type="button" value="Save Changes"/> |                               |                    |                                     |

- 3) Enter the **amount** in the Invoice Amount field.
- 4) Click  .

*The Invoice Summary page appears with new Invoice Amount and Current Balance.*

### Activity:3153 Training Service Activity Budget:1

| Line Item | Category                      | Program Component   | FTE | Reimbursable Cost | Balance to Date | Invoice Amount | Current Balance |
|-----------|-------------------------------|---------------------|-----|-------------------|-----------------|----------------|-----------------|
| 40515     | 1-Direct Care / Program Staff | 151 Fringe Benefits | 0   | \$23,000.00       | \$5,750.78      | \$5,000.00     | \$750.78        |
| Total     |                               |                     | 0   | \$23,000.00       | \$5,750.78      | \$5,000.00     | \$750.78        |

☐ By checking this box, you hereby confirm that by clicking the "Authorize" or "Release" button below, you are providing data that is complete and accurate in all respects, and that you have been given authority by your organization to submit such data through EIM. If after submission of this record you determine that it is incorrect, you can submit a supplemental transaction to correct it. Please see the user guide for instructions on submitting supplemental transactions.

**Virtual Gateway Customer Service**  
**1-800-421-0938**